

# Northumberland Knowledge



## Know Guide

Run a Survey

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## Guidelines for Carrying out a Survey

Organisations are becoming increasingly aware of the importance of getting feedback from all of their customers, employees, and stakeholders that they interact with. One of the most common mechanisms used to gather this feedback is the use of surveys. This document highlights some of the areas which it would be useful for you to consider when deciding if a survey is the best way of getting the information you need. It also identifies things to consider when planning your survey.

There are many advantages of using surveys:

- Can be cost effective way of reaching a large audience.
- A way of collecting a lot of information in a short space of time.
- Allows anonymity.
- Can be carried out by post, telephone or online.
- Allows statistical analysis.
- Allows respondents to answer at their convenience, at a time and location where they are comfortable.

However, like any research tool they also have disadvantages:

- No opportunity to probe for more detail on open-ended questions.
- Allows limited exploration of attitudes and views.
- May not be appropriate for certain groups.
- May get low response rate.

When you have decided that a survey is the best method to use. There are number key steps to consider *i.e. identifying your objectives, designing your survey, carrying out your survey, analysing your findings and presenting your results*. The rest of the document will work through these key considerations.

### Step 1: Identifying your objectives

The first part of the planning process is to identify the objectives of your survey or what you want to find out. A survey can be a useful tool in helping to identify how your organisation is performing in terms of meeting customer and stakeholder expectation.

### Step 2: Designing your survey

There are lots of examples of different types of survey available by searching online, however whilst this is a good method of finding similar surveys that other organisations have conducted. It is important that this is only used as a guideline and that the survey is adapted to suit the needs/focus of your organisation.

Key things to consider when designing a survey:

- Keep it as short as possible, it should take no longer than 10-15 min to complete.
- Use plain, simple language and avoid jargon.
- Use a mixture of open and closed questions.
- Use clear headings and numbers to structure your survey.
- Make sure to use an easy to read font such as Arial and at least font size 12.

Once you have designed your survey you should consider carrying out a pilot with a small number of people. Piloting the survey will help to make sure that the questions make sense and highlight any

ambiguity in the meaning of the words or phrases. Try not to use respondents that would form part of the actual sample, as these people are for the real run!

### **Step 3: Carrying out your survey**

Consider who you want to include in the survey and decide how it will be given out i.e. postal, electronic or telephone. In order to be inclusive you should think about the most appropriate completion method. You may need to provide multiple methods. It is important also to offer one to one support for those who may have difficulty completing the questions by themselves for example those with literacy problems or visual impairment. If sending postal surveys, where possible, try and include a self addressed, free post envelope.

- Ensure you have an up-to-date list of emails and/or postal addresses for respondents. Keep a record of how many people you have approached to take part, this will help you to calculate your overall response rate.
- Decide who you are going to include in the research, if you are not including you will have to create a sample. This means deciding who you are going to involve, for example you can choose to cover a particular time period. Try to get a spread across, geography, age and gender so that results are more representative of your customer base.
- It is important that you keep your sampling technique consistent and open; not just picking those who you would prefer to include or only including people you think will be more likely to respond.
- Decide how long you have to carry out the work and set a time frame for the design, distribution and analysis of results.
- Ensure that you have a safe place to securely store completed surveys, which can only be accessed by those working on the data; a locked filing or storage cabinet is ideal.

#### **Ideas of how to maximise response rates**

- Add a cover letter providing a clear explanation of the survey objectives and how the information will be used and stored by your organisation. Offer to give feedback on the results of the survey to all those who participate so they can see the outcome of their contribution.
- Give clear instructions on how to return and complete the survey and provide a deadline for response i.e. 2 weeks.
- Ensure you provide contact details of a nominated person who can answer any questions or queries.
- Keeping surveys anonymous can be beneficial as people may be more open and honest with their feedback and comments.
- Offer a free post self-addressed envelope.
- Follow up on postal surveys with a telephone call or a 2nd copy of the survey.

### **Step 4: Analysing your findings**

Analysing findings simply means looking at the information you have gathered (data) and drawing conclusions (what you have found out). This can involve creating graphs, charts and percentages. Depending on the number of responses to your surveys you can use different methods of analysis;

- If using a small number of respondents i.e. no more than 15, you could use paper to collate results. If you have between 15- 30 people, it is easy to input information into a spreadsheet.
- For a large number of surveys you should consider using the online survey tool Northumberland County Council use a software package called SNAP, however there is a free software available online such as Survey Monkey that anyone can use when developing an online survey. It acts as a data collection and analytical tool. It allows people to complete

surveys online and you can also manually enter surveys from postal returns; it creates charts which you can input into word to produce reports. To find out more go to. <http://www.surveymonkey.com/>.

- When looking at your findings you can draw conclusions and recommendations from the data. This may include things that your organisation is doing well or areas for future improvement. You can also use the data to describe what customers have gained from being involved, how satisfied they feel and the benefits of interactions with your organisation.

### **Step 5: Presenting your results**

Once your survey has been completed and you have analysed your results it is important to present and publicise the findings. This can be done in a number of ways:

- A summary sheet highlighting the main findings.
- A brief report.
- Information session with managers, staff and volunteers explaining the findings and any recommendations.
- A presentation to funders or management board.
- You can use your findings in the future to give support to funding applications and in marketing and publicity material.



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